

Trusts and Estates Section of the State Bar of California presents

Battling Fiduciaries

6.5 Hours MCLE General Credit

(Includes 6.5 Hours Legal Specialization in Estate Planning, Trust and Probate Law)

Friday, May 30, 2008 • LAX Marriott Hotel • 5855 West Century Blvd. • Los Angeles, California

Friday, June 13, 2008 • Hotel Nikko • 222 Mason Street • San Francisco, California

The State Bar of California and the Trusts and Estates Section are approved State Bar of California MCLE Providers



ITINERARY:

8:30–9:00 am
Registration

9:00 a.m.–12:15 p.m.
Morning Session:
Mary Gillick
Charles P. Wolff
Margaret G. Lodise

12:15–1:30 pm
Networking Lunch

1:30–4:45 p.m.
Afternoon Session:
S. Andrew Pharies
Richard Kinyon
Betty J. Orvell

The morning session will feature panels including seasoned litigators who will discuss areas of vulnerability in trusts and estates planning (i.e., the documents) and administration. Panelists will demonstrate how an estate plan or administration can come under attack by beneficiaries, creditors, and other interested parties. In the afternoon, three veteran estate planners will focus on how to draft and plan estates and the practices and procedures that trustees should follow to avoid being the target of such litigation. The litigators and planners will share their experiences, and case studies will be used.

Speakers

Betty J. Orvell **Reed Smith LLP, Oakland**

Ms. Orvell is a partner in the law firm of Reed Smith LLP, with California offices in Oakland, San Francisco, Century City and Los Angeles. Her practice focuses on estate planning, probate and trust administration, distribution of employee benefits and estate and trust-related litigation. She received her B.A. degree cum laude from Tufts University, her M.A. from the University of Pennsylvania and her J.D. magna cum laude from the University of California Hastings College of the Law. At Hastings, she was a member and Technical Editor of the Hastings Law Journal, and a member of the Thurston Society and Order of the Coif. Ms. Orvell was admitted to the California Bar in 1986 and is certified as a specialist in estate planning, trust and probate law by the California Board of Legal Specialization. She is a Fellow of the American College of Trust and Estate Counsel (ACTEC), and was a long term member and advisor of the Trusts and Estates Section executive committee of the State Bar of California (Chair 2000-2001). She is also the former chair of the Trusts & Estates Section of the Alameda County Bar Association (1998-1999).

Charles P. Wolff **Evans, Latham & Campisi, San Francisco**

Charles P. Wolff is a 1977 cum laude graduate of the University of Michigan Law School, having received a B.A. from Wesleyan University in 1974. He has been a business litigator his entire legal career and has specialized in probate, trust, and fiduciary litigation since coming to Evans, Latham & Campisi in 1985. He is a fellow of the American College of Trust and Estate Counsel. He served on the Executive Committee of the Trusts and Estates Law Section of the State Bar of California from 1999-2005 and was chair of the Section's Ethics Committee. He is also a former chair of the Litigation Subcommittee of the Probate and Trust Section of the Bar Association of San Francisco. Mr. Wolff is a co-author of "The Dead Hand Writes – And, Having Writ, Moves On: Drafting and Litigating No Contest Clauses," in the Winter 2003 issue of the California Trusts and Estates Quarterly.

Mary F. Gillick **Luce Forward Hamilton & Scripps, LLP, San Diego**

Ms. Gillick is a Partner at Luce Forward Hamilton & Scripps LLP, where she practices exclusively in the areas of trust, estate and related litigation. She has served as the Litigation Chair of the Executive Committee of the Trust and Estate Section of the California State Bar, where she served as the Chair of the Litigation Committee, spoke frequently at State Bar meetings, authored legislation and contributed regularly to the Quarterly publication. Additionally, Ms. Gillick is a co-author of West Publishing California Civil Practice - Probate and Trust Proceedings and has authored many other publications in this area of law. Currently, she is on the Fiduciary Litigation Committee of the American College of Trust and Estate Counsel.

Margaret G. Lodise **Sacks Glazier Franklin & Lodise LLP, Los Angeles**

Ms. Lodise graduated cum laude from Pomona College in 1985. She received her law degree in 1988 from the University of California at Los Angeles and her LLM in Taxation from Loyola Law School in 2001. Meg is a partner at Sacks, Glazier, Franklin & Lodise LLP specializing in estate, trust and conservatorship litigation. Meg speaks regularly on estate and trust-related issues before both bar and community organizations. Meg is a Fellow of the American College of Trusts & Estates Counsel and currently a member of the State Bar of California's Trusts & Estate Section Executive Committee. Meg is a past President of the Women Lawyers' Association of Los Angeles, a past chair of the Los Angeles County Bar Association's Trusts & Estates Section and was a selected as a member of the Judicial Council Task Force on Conservatorships in 2006-2007. Meg also serves as a member of the Board of Trustees of Pomona College.

Richard S. Kinyon **Morrison & Foerster, San Francisco**

Mr. Kinyon was born in Minneapolis, Minnesota, in 1939. He attended Dartmouth College from 1957 to 1959, and received his B.A., cum laude, in 1961 and his LL.B., cum laude, in 1965 from the University of Minnesota. He was a member from 1963 to 1965 and president during 1964-1965 of the Minnesota Law Review. He associated with the firm of Morrison & Foerster in 1965 and was a partner of the firm from 1971 to 2004. Mr. Kinyon has been active in a number of professional organizations for many years, including the Taxation Law and the Real Property, Probate, and Trust Law sections of the American Bar Association, and the comparable sections of the State Bar of California, and the Bar Association of San Francisco. He was Chairman of the Estate Planning, Trust, and Probate Law Section of the San Francisco Bar Association during 2001. He has been a member of the American College of Trust and Estate Counsel and the International Academy of Estate and Trust Law since 1975.

S. Andrew Pharies **Ferrette, Alcorn, Pharies & Dorgan, ALC, San Diego**

Mr. Pharies is a shareholder of the law firm Ferrette, Alcorn, Pharies & Dorgan, ALC. He is a Certified Specialist in Estate Planning, Probate, and Trust Law, State Bar of California Board of Legal Specialization. Mr. Pharies earned a B.S. in economics from the University of California, Riverside, and a J.D. from the University of Oregon School of Law where he served as Editor-in-Chief of the Oregon Law Review. Mr. Pharies is a frequent speaker on various topics relating to trusts and estates and taxation having lectured for many organizations including, but not limited to, the Continuing Education of the Bar, the American Bar Association, the California CPA Foundation, and the San Diego Tax Institute. In his practice, Mr. Pharies represents high net worth families in estate planning and business succession planning, and he represents corporate and individual trustees and beneficiaries in post-death trust and estate administrations.

Registration Form

Battling Fiduciaries

Friday, May 30, 2008 • Los Angeles, California

Friday, June 13, 2008 • San Francisco, California

Note: One registrant per form. Photocopies may be used.

Check Location: ☐ Los Angeles, May 30 ☐ San Francisco, June 13

Bar Number: _____

Name: _____

Firm: _____

Address: _____

City, State, Zip: _____

Phone: _____ Fax: _____

E-mail Address*: _____

*Required for e-mail confirmation

Registration Fees (must be received by May 26, 2008)

Please check the appropriate box below:

☐ \$275 Members of the Trusts & Estate Section

☐ \$345 Non-Section Members (Includes enrollment in the Trusts & Estates Section for 2008)

Amount Enclosed/To Be Charged..... \$ _____

Credit Card Information

I authorize the State Bar of California to charge my program registration to my VISA/MasterCard account. No other credit card will be accepted.

Account Number _____ Exp. Date _____
(VISA/MasterCard only)

Cardholder's Name _____

Cardholder's Signature _____

REGISTRATION INFORMATION DEADLINE

In order to pre-register, your form and check, payable to the State Bar of California, or credit card information MUST BE RECEIVED BY MAY 26, 2008.

REGISTER ON-LINE: Go to www.calbar.ca.gov/trusts

MAIL TO: Program Registrations, State Bar of California, 180 Howard St., San Francisco, CA 94105

or FAX TO: Program Registrations at (415) 538-2368. In order to fax your registration, credit card information is MANDATORY. Photocopies of checks will not be accepted.

CANCELLATIONS/REFUNDS

Cancellations and requests for refunds must be received in writing by May 26, 2008.

Substitute registrants are allowed but must register in their own name to receive MCLE credit.

ON-SITE REGISTRATION is limited and subject to availability.

QUESTIONS

For program registration questions please call (415) 538-2508. For information regarding the program please call (415) 538-2206. The State Bar of California Section Education & Meeting Services is a State Bar of California approved provider.

SPECIAL ASSISTANCE

Please call (415) 538-2206.

To order audio tapes of this program contact the Versatape Company at 1-800-468-2737.

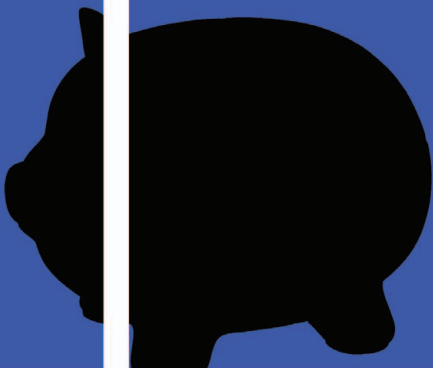
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